



MVAM  
MOLE VALLEY  
ASSET MANAGEMENT

MAKE THE WORLD  
BETTER PORTFOLIO



# WHO?

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

# WHAT?

The Make The World Better Portfolio is built on the key targets that underpin the UN Sustainable Development Goals with the aim of 'improving health and education, reducing inequality, and spurring economic growth – all while tackling climate change and working to preserve our oceans and forests'.

Through a process of proprietary screening and fundamental analysis we identify listed companies from across the UK and Europe whose activities are helping to achieve those ambitious targets, and which we believe also offer attractive financial returns.



# WHY?

## It's not just about the money

We recognize that whilst our clients quite rightly expect a financial return from their investments, it doesn't have to be at the expense of our environment or detrimental to our society.

Indeed, there is growing evidence that investing in companies that consider these broader responsibilities and that provide services, or produce goods, that genuinely help to make the world a better place will also perform better over the long term.

## Rewarding risk

Portfolio construction reduces the risk by investing in:

- Multiple Sectors,
- A balance of larger companies to ensure liquidity, and smaller companies that reflect the nascence of their industries.
- Equally weighted positions, rebalanced when necessary.

## RETAIN ACCESS

If you need your money back, no problem – we simply sell the shares and send you the money.

## KEY BENEFITS

- Invest in good quality companies
- Consistent, repeatable strategy
- Clear reporting
- Money back usually within a week of receiving a redemption request

## FAIR FEES

- No charge for advice
- No entry fees or exit fees
- Annual management charge of 1.25% including VAT
- Dealing and admin fees will be charged

## OUR PORTFOLIO FAMILY

- AIM Inheritance Tax Portfolio (IHT)
- Bespoke Investment Portfolios (BIPs)
- Fixed Income Portfolio (FIP)
- Make the World Better Portfolio (MTWB)
- Premium Dividend Portfolio (PDP)
- Rain or Shine Portfolio (RoSP)
- Yorkshire T20 Portfolio (YT20)

## SAVING THROUGH

- Pensions
- Corporate Pension Schemes
- General Investments Accounts (GIA)
- ISAs

## WARNING

The value of your investment in this portfolio and the income from it may go down as well as up, and you may not get back what you invested.

# ABOUT US

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

A highly experienced team investing clients' savings directly into the markets aided by proprietary screening and original research.

A dedicated investor portal app.

Personalised reports issued monthly.

We always remember, 'It's your money'.

# GET IN TOUCH TODAY

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Mole Valley Asset Management Ltd (MVAM), registered in England (Company no. 08600041) is authorised and regulated by the Financial Conduct Authority (registration no. 613008).